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52nd ANNUAL MARKET STATISTICS ISSUE

IMPLEMENT & TRACTOR

The Business Magazine of the Agricultural, Industrial & Outdoor Power Equipment Industry

NOV-DEC 1989

VOLUME 104 NO. 12

Deere, Cyanamid: Closed Handling System

A 'CLOSED' granular handling system is the result of a joint John Deere-American Cyanamid project. The system, a means of minimizing farm worker exposure to pesticides, will be initially marketed for use with Deere MaxEmerge planters and American Cyanamid's Counter, a systemic insecticide-nematicide.

The planter's hopper lid and the insecticide package are made so that the operator will not normally touch or inhale the pesticide during loading of the unit for use. There is a dispensing valve on the returnable pesticide package and a receiving valve on the hopper lid. Coupled, they open automatically so the material can flow in. Uncoupled, the valves close automatically.

STRONG RESOLUTIONS ISSUED—

NAEDA Tackles Dealer Policies

The Industry Relations Committee of the North American Equipment Dealers Assn. has issued a series of strong resolutions concerning Deere, Ford New Holland and Massey-Ferguson. Litigation is considered likely.

The relevant portions of the resolutions, made Oct. 20, are:

"Whereas the NAEDA board of directors have considered the effect of the John Deere Co. unilaterally amending the John Deere authorized dealer agreement to provide that at the company's sole option, a dealer can be required to separate personnel, facilities, capital or other resources.

"Whereas the John Deere dealer agreement provides that any amendment shall be effective at least 180 days following the date of mailing of such amendment.

"Whereas such amendment would in many cases force a dealer to relinquish the John Deere dealer agreement by requiring separation of the dealership.

"And whereas the language of the amendment can be interpreted to

(See NAEDA, Page 28)

FEWA, FEMA Make Up: It's St. Louis in '90

The Farm Equipment Wholesalers Assn. has voted not to separate its convention from that of the Farm Equipment Manufacturers Assn. in 1990. The count was 44 to 15 after participating companies cast ballots during the 1989 convention in Nashville, Tenn., Oct. 31.

The two groups have met side by side, same hotel and city, since FEMA's founding in 1950. A split developed after FEMA announced its intention to form two associate member groups, one for wholesalers and one for manufacturers' representatives. FEWA then announced its intention to move its 1990 convention from the Adams Mark Hotel, St. Louis, where FEMA is also scheduled, to Kansas City.

The FEWA vote to keep its convention beside the FEMA gathering came after FEMA said it would drop plans to form the associate sections.

Full coverage of the 1989 conventions will appear in the January issue of *I&T*.

How Will We Hold on to Sales Margins?

By BILL FOGARTY

The veteran marketing V-P was reflecting on a scene he had witnessed at one of his top-selling dealerships. The dealer was approached by a shopper looking for a compact tractor. First question: How much?

"This dealer wouldn't answer the question," my friend recalled. "Instead, he countered with questions of his own about what the tractor would be needed for. He got his answers, but the guy kept pressing on a price. When the dealer quoted a

EDITOR'S NOTEBOOK

ballpark figure of around $18,000, the shopper said that this other dealer down the road would give him a tractor the same size for about $3,000 less."

Here's where the dealer took charge of the situation. "He took that shopper around his parts department, showed him what he had, took him into the shop. Told him about all the training and experience the technicians had. Told him about the resources it took to be responsive to emergency service

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EDITOR'S NOTEBOOK

Holding On To Sales Margins

(continued from Page 1)

calls, and showed him the reality of all of it.

"He knew about the dealership offering the much cheaper price. He asked the guy if it looked like that dealer would be there in years to come. He didn't miss a trick. And when he was done, the guy was glad to get a tractor at such a good price as $18,000."

I know the dealer and so I believe that's just what happened that day. I had a question for my marketing friend: "If you were a young blockman the day that happened, do you think that when the time came for the dealer to stand his ground, you might have taken him aside and urged him to back down some on price so as not to lose the sale to another dealer and manufacturer?"

My friend admitted that it does take some maturity and strength to take charge of the selling situation, and that maybe there isn't enough of that going around these days, either among dealers or the suppliers who many expect to guide them into better profit performance.

Dealers everywhere are feeling the margin pinch, and not just the weak or inexperienced ones.

We were talking about margins, the very thin margins that dealers are experiencing these days. These are times of good farm income and tight supplies. Margins should be okay. But dealers everywhere are feeling the margin pinch, and not just the weak or inexperienced ones. The reasons they give are numerous, and they boil down to a few points:

***Manufacturers** have county retail sales data now. They use it to exert pressure on dealers to maintain market share (sometimes with hints of what might happen to the dealer if he underrepresents the brand in his territory). The result is dealers willing to give away too much margin to get deals.

***In the '80s,** we lived through a strange time in which farmers got used to our radical price-cutting. Most surviving farmers are too shrewd to let us get much margin without an intense struggle.

***Nobody knows** the guts of the products anymore, how to do predelivery right, how to make them do their best, how to make the customer feel good about the machine. The manufacturers gave early retirement to their corps of old pros who had the knowledge and skills. Yes, they cut their payroll costs and it helped companies survive. But oh, didn't they pay a price! Meanwhile, many dealers lost good salesmen to other fields as the ag depression went on through the 1980s. And now, who's left who knows how to talk anything but price?

***We're moving toward** a low-inventory distribution system in which dealers don't have the goods on hand the way they used to. It means that the margin-holding techniques of demonstrating and being able to offer "instant gratification" to that impulse-buying farmer don't count for as much as they did. How do you create desire with just pieces of paper and a videotape?

***There are still** too many dealers chasing after too few farmers.

***It's our own** damned fault.

***It's the manufacturers'** fault for not recognizing what their dealers need to survive.

That's enough in the way of points. All of them are true to some extent, depending on the situation, I suppose. Is there anything to be done about the situation?

I had the bright idea that it would be helpful if the dealer associations called small, regional meetings of their members on the subject. There, I reasoned, there would be a community effort to show those rampant discounters the error and self-destructiveness of their ways.

Like most of my ideas, it had a fruitcake quality to it, but at least I wasn't the only one who had it. An association manager sprang the same thing on his board and was shot down promptly. For one thing, big discounters are unlikely to go to meetings at which their weaknesses are on display. Also, since the low-margin players are so numerous among dealers, I'd guess that some of them were on that board themselves.

Okay, moving on to my next idea: Why is it necessary for companies to make heros of dealers who are selling their stuff at ridiculous margins? These dealers may be improving the manufacturer's market share, but what's going to happen when all the travel incentives have been given out and there's no money left to pay the dealership's bills? What will happen to the precious market share then?

A marketing executive with one of the majors agrees. "We have to give our dealers the opportunity to make a lot of money," he says. "Instead, we glorify those big-volume, low-margin dealers right up to the day before they go out of business. Then we sweep the 'why' of what happened under the rug."

BILL FOGARTY

He added: "It was probably okay to have a lot of in-line dealer competition back in the days of a rising market. When you're dealing with a mature market like this one, it's different."

So if they can see what the destructiveness of low-profit competition is doing to themselves as well as to a lot of their dealers, why can't manufacturers introduce a few positive policies?

For instance, are any of those sales contests ever constructed so that dealers earn points for *margins* as well as unit sales? If demonstrations tend to strengthen margins as well as to increase sales, can they be attached in some way to the incentive programs?

Far more meaningful than that would be a basic look at marketing policies and practices. What did the company go to the trouble of building a dealer organization *for*, anyway? Was it so that they could beat each other into oblivion?

For some companies, the idea has been to let the brute forces of marketplace attrition be the total determinant of who makes it and who fails. (And then, strangely, they've been known to go out and appoint dealerships where experience had indicated they shouldn't. Perhaps they were worshiping that golden idol, Market Share, too much.)

Wouldn't it make more sense to have a plan as to how many and where the pins in the wall map ought to be in the year 1995 or 2000?

In the industrial equipment field, we hear about some companies having an arrangement with their dealers granting exclusive territories. If a dealer in area A sells a machine to a customer in area B, the dealer for area B gets a slice of the margin. This recognizes that the B dealer may be expected to fulfill some service responsibilities later. It also means that the A dealer is only going to cut the price so much. Reasonable margins are achieved.

This sort of system isn't a part of the farm equipment marketing mainstream. It might have some negatives mixed in with positives. But in view of what's been happening, isn't it worth some exploration?

What's the function of sales personnel in the field, and how are their performances measured? Are they there to teach and counsel in

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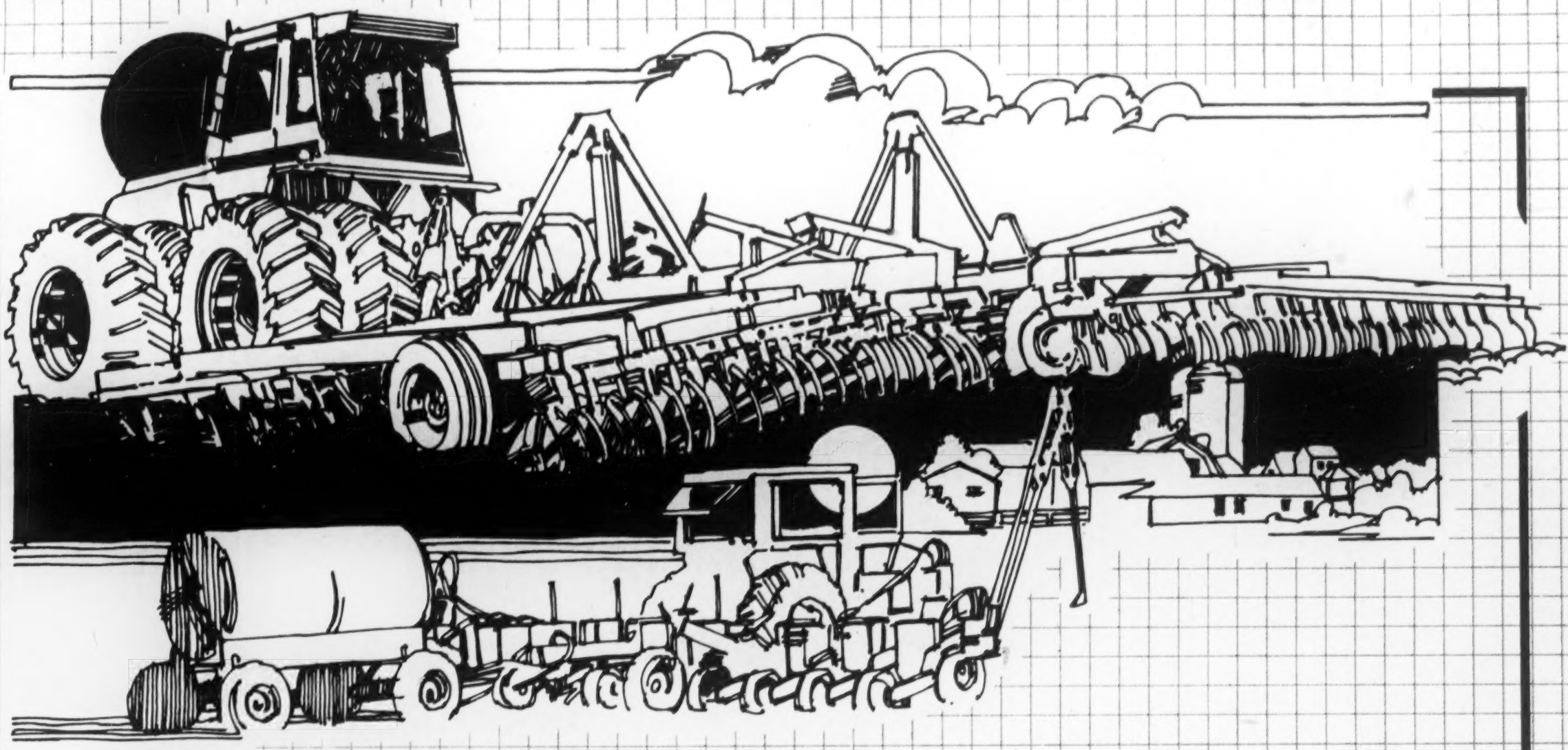

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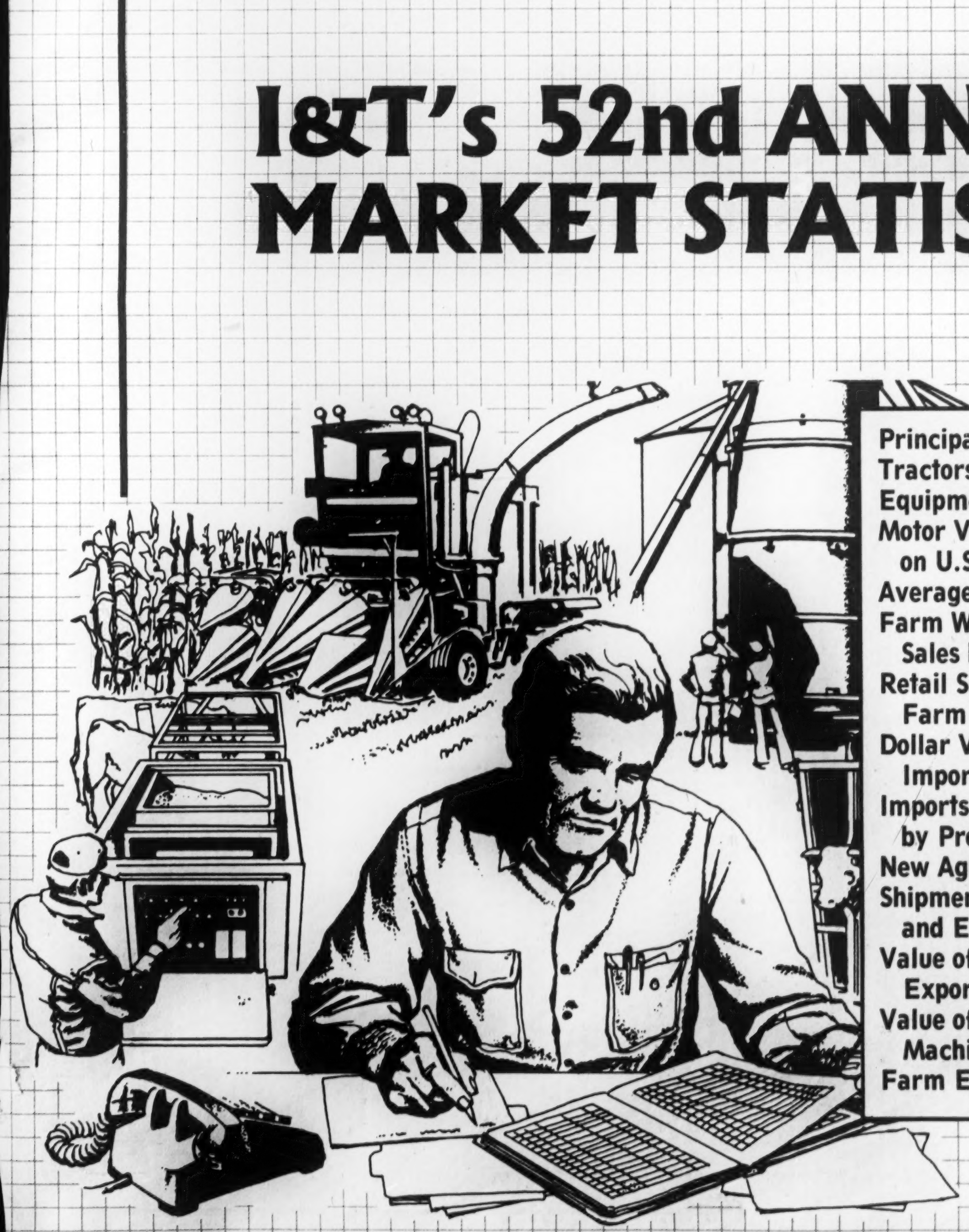

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Principal Machines on Farms — 1989

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Maine	13,741	13,569	13,225	388	320	265	183	181	165	4,815	2,815	280	760	7,595	5,235
New Hampshire	4,877	5,097	5,125	14	8	5	64	50	40	2,270	1,800	250	50	2,595	2,215
Vermont	14,637	15,274	15,315	156	76	59	346	374	360	7,325	5,675	1,425	285	8,775	6,610
Massachusetts	9,840	9,956	9,830	26	23	18	113	145	140	3,285	2,050	780	95	5,250	3,150
Rhode Island	1,462	1,364	1,275	13	6	4	17	13	5	455	240	90	25	610	285
Connecticut	7,865	8,421	8,535	86	53	38	157	98	70	3,825	2,205	915	70	4,985	2,225
New York	120,215	119,498	117,120	5,775	6,030	6,000	3,401	3,904	3,960	63,740	36,265	17,525	24,020	69,495	42,910
New Jersey	20,655	20,554	20,160	1,086	1,011	930	532	593	580	5,610	2,170	2,140	2,200	14,480	3,595
Pennsylvania	137,998	136,505	133,430	9,674	9,707	9,470	4,409	5,408	5,620	67,900	37,520	30,195	36,055	88,280	44,255
Delaware	8,348	8,012	7,815	1,314	1,342	1,330	1,003	1,006	955	3,605	1,590	1,890	1,820	5,570	940
Maryland	36,251	36,951	36,650	3,518	3,279	3,071	2,732	2,840	2,760	14,975	7,560	7,705	7,945	24,970	8,050
NORTHEAST	**375,889**	**375,201**	**368,480**	**22,050**	**21,855**	**21,190**	**12,957**	**14,612**	**14,655**	**177,805**	**99,890**	**63,195**	**73,325**	**232,605**	**119,470**
Ohio	198,865	193,367	187,230	33,449	33,200	32,245	24,438	26,403	26,160	116,730	50,740	57,160	57,430	141,900	50,360
Indiana	176,767	167,563	159,845	37,403	34,646	32,400	32,638	31,391	29,140	115,860	44,870	58,615	46,785	121,180	37,165
Illinois	277,604	262,112	253,240	63,230	61,411	59,085	55,793	55,636	53,035	176,400	65,630	85,745	58,995	157,195	48,225
Iowa	323,132	305,334	293,555	55,586	57,726	57,805	53,030	57,046	56,425	186,300	89,570	95,350	54,725	187,295	81,515
Missouri	198,225	193,758	188,990	33,378	32,957	31,915	23,056	21,834	20,210	82,590	50,350	45,675	47,560	132,025	48,135
CORN BELT	**1,174,593**	**1,122,134**	**1,082,860**	**223,045**	**219,940**	**213,450**	**188,955**	**192,310**	**184,970**	**677,880**	**301,160**	**342,545**	**265,495**	**739,595**	**265,400**
Michigan	148,063	146,655	143,955	18,919	21,060	21,275	11,076	13,583	14,315	82,790	33,105	34,665	46,200	114,405	39,495
Wisconsin	252,594	243,827	236,180	18,262	19,215	19,220	8,458	11,939	13,275	130,605	76,015	61,120	58,895	146,550	82,580
Minnesota	227,920	264,581	254,615	44,841	45,847	45,370	27,197	31,098	31,715	146,280	68,765	73,575	68,290	158,065	79,865
LAKE STATES	**678,577**	**655,063**	**634,750**	**82,022**	**86,122**	**85,865**	**46,731**	**56,620**	**59,305**	**359,675**	**177,885**	**169,360**	**173,385**	**419,020**	**201,940**
North Dakota	120,191	108,103	102,280	30,782	27,546	25,850	1,619	2,708	3,055	70,890	18,710	13,710	54,050	57,975	20,830
South Dakota	111,485	105,699	99,960	16,503	16,961	16,785	7,759	9,606	10,315	62,950	26,145	27,745	30,610	58,170	21,205
Nebraska	175,569	164,308	158,150	35,083	34,032	32,700	24,623	25,484	25,255	97,560	40,060	41,435	39,230	82,565	32,215
Kansas	157,327	149,870	144,435	47,142	46,662	45,285	9,150	8,321	7,265	104,080	33,400	20,085	63,735	83,820	33,085
GREAT PLAINS	**564,572**	**527,980**	**504,825**	**129,510**	**125,201**	**120,620**	**43,151**	**48,119**	**45,890**	**335,480**	**118,315**	**102,975**	**187,625**	**282,530**	**107,335**
West Virginia	24,901	27,110	27,595	479	562	605	265	471	490	6,275	7,570	4,775	3,340	17,275	8,830
Kentucky	157,432	163,176	162,310	10,568	11,466	11,685	8,382	9,924	10,255	24,230	24,970	35,150	10,315	98,150	28,620
Tennessee	120,161	126,365	128,290	10,765	11,227	11,195	5,581	6,508	6,690	14,940	18,220	47,505	12,880	63,690	22,810
Virginia	83,836	88,511	88,525	5,878	6,224	6,235	4,255	5,061	5,150	18,455	19,490	23,655	15,540	59,140	21,740
North Carolina	145,863	131,488	125,025	13,297	13,820	12,175	10,326	10,618	10,245	20,220	19,080	66,720	20,830	56,820	14,850
APPALACHIAN	**532,193**	**536,650**	**531,745**	**40,987**	**42,299**	**41,895**	**28,809**	**32,582**	**32,830**	**84,120**	**89,330**	**177,805**	**62,905**	**295,075**	**96,850**
South Carolina	47,967	44,338	41,335	6,420	6,263	5,990	3,854	3,808	3,620	4,685	3,520	27,955	10,750	9,875	5,485
Georgia	79,031	75,505	72,105	9,589	8,980	8,485	7,302	6,438	5,730	13,720	5,970	35,535	9,270	28,070	9,880
Florida	51,099	52,346	52,030	1,726	1,742	1,690	1,112	1,307	1,330	3,635	1,075	5,450	1,605	18,195	1,790
Alabama	69,438	66,330	63,400	6,660	6,935	6,925	3,383	3,630	3,575	11,255	3,985	38,720	6,515	21,000	7,085
SOUTHEAST	**247,535**	**238,519**	**228,870**	**24,395**	**23,920**	**23,090**	**15,651**	**15,183**	**14,255**	**33,295**	**14,550**	**107,660**	**28,140**	**77,140**	**24,240**
Mississippi	72,483	70,139	68,160	9,911	9,695	9,360	527	861	970	7,700	4,545	48,085	7,670	26,525	9,090
Louisiana	58,373	56,883	55,260	9,624	8,468	7,665	377	286	225	2,515	2,620	16,220	6,865	19,845	5,870
Arkansas	84,108	81,556	79,030	13,960	12,891	12,025	292	221	180	9,400	6,395	19,985	12,250	43,850	9,800
DELTA STATES	**214,964**	**208,578**	**202,450**	**33,495**	**31,054**	**29,050**	**1,196**	**1,368**	**1,375**	**19,615**	**13,560**	**84,290**	**26,785**	**90,220**	**24,760**
Oklahoma	99,771	99,934	98,420	17,647	17,299	16,685	822	600	470	25,100	8,310	8,450	29,930	73,370	18,630
Texas	262,886	264,740	262,015	23,026	21,049	19,415	3,628	3,913	3,875	39,950	15,765	50,790	46,885	83,915	21,640
S. PLAINS	**362,657**	**364,674**	**360,435**	**40,673**	**38,348**	**36,100**	**4,450**	**4,513**	**4,345**	**65,050**	**24,075**	**59,240**	**76,815**	**157,285**	**40,270**
Montana	54,737	54,666	53,680	13,180	12,038	11,030	101	89	65	27,920	9,790	1,005	20,245	26,065	13,095
Idaho	53,552	50,575	48,365	9,843	9,309	8,780	414	344	310	24,370	12,215	2,445	14,720	31,650	15,335
Wyoming	19,322	20,673	20,920	1,999	1,991	1,935	171	221	230	5,010	4,190	875	3,920	14,860	4,940
Colorado	58,331	56,141	54,350	8,404	7,994	7,615	2,397	2,618	2,580	25,100	12,460	5,715	14,625	24,885	13,485
New Mexico	16,601	17,455	17,445	1,513	1,346	1,200	246	308	320	2,560	2,030	2,905	1,850	8,320	3,980
Arizona	11,956	12,262	12,170	509	369	275	60	94	85	1,790	860	1,745	1,350	3,190	1,335
Utah	21,145	21,613	21,410	1,743	1,591	1,445	186	225	225	10,020	6,755	1,560	5,215	14,375	8,860
Nevada	5,142	5,160	5,085	263	234	185	3	19	20	935	990	60	300	2,420	1,415
Mt. STATES	**240,786**	**238,545**	**233,425**	**37,454**	**34,872**	**32,465**	**3,578**	**3,918**	**3,835**	**97,705**	**49,290**	**16,310**	**62,225**	**125,765**	**62,445**
Washington	53,301	59,377	61,145	8,431	8,314	8,040	470	558	570	21,660	12,880	1,685	16,365	35,145	12,910
Oregon	48,158	53,243	54,865	6,335	6,235	6,020	*	209	205	17,460	11,365	1,045	11,265	34,160	11,355
California	129,480	139,735	143,620	6,270	6,102	5,850	1,016	1,123	1,115	24,125	13,370	8,465	8,470	57,105	13,095
PACIFIC	**230,939**	**252,355**	**259,630**	**21,036**	**20,651**	**19,910**	**1,486**	**1,890**	**1,890**	**63,245**	**37,615**	**11,195**	**36,100**	**126,410**	**37,360**
TOTAL	**4,622,705**	**4,519,699**	**4,407,470**	**654,667**	**644,262**	**623,635**	**346,964**	**369,115**	**363,350**	**1,913,870**	**925,670**	**1,134,575**	**992,800**	**2,545,645**	**980,070**

*Not reported separately. [1]Cutter bar type only. [2]Shear-bar type. [3]Does not include windowers with conditioning rolls. [4]Includes engines used for stationary work such as irrigation auxilliary engines on combines, balers, etc., and a small number of power units not elsewhere classified.

Tractors on Canadian Farms, 1986

(by province and pto horsepower)

Province	Under 50 hp	50-99 hp	100-149 hp	Over 150 hp	Total
Newfoundland	468	192	22	11	693
Prince Edward I.	2,449	2,910	626	80	6,065
Nova Scotia	4,392	2,941	303	94	7,730
New Brunswick	3,365	3,011	600	129	7,105
Quebec	45,202	43,269	5,800	1,819	96,090
Ontario	93,850	72,872	15,859	4,584	187,165
Manitoba	27,102	26,109	13,676	7,058	73,945
Saskatchewan	50,748	53,044	40,226	23,016	167,034
Alberta	51,362	50,685	30,171	18,261	150,479
Brit. Columbia	17,940	10,635	2,328	885	31,768
Total	**296,878**	**265,668**	**109,611**	**55,917**	**728,074**

SOURCE: Census of Canadian Agriculture, Statistics Canada, Ottawa, Ont.